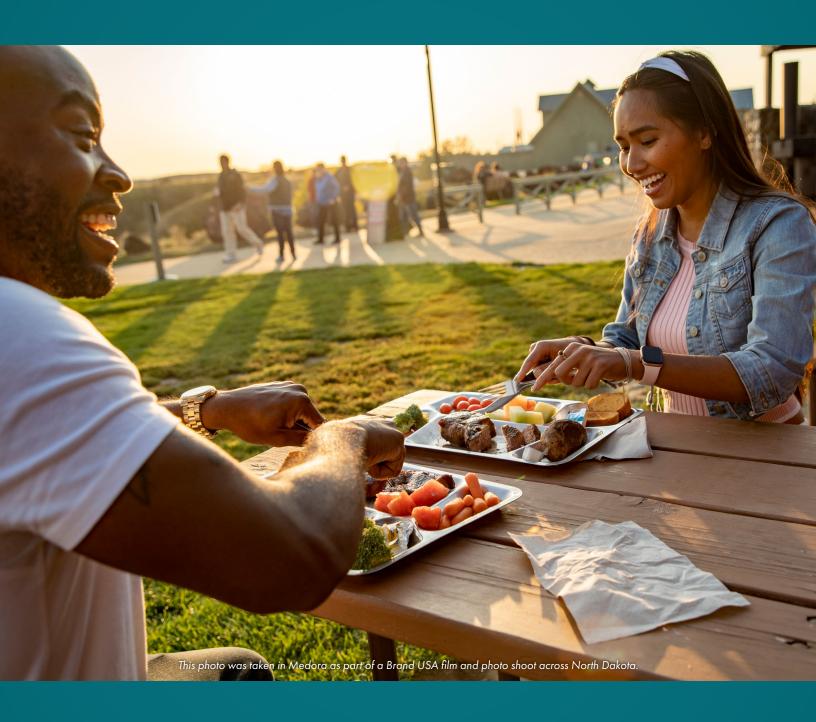
# 2021 ANNUAL REPORT





North Dakota Department of Commerce Tourism Division Report on Marketing North Dakota and the Travel and Tourism Industry

#### YEAR IN REVIEW & RESEARCH

North Dakota had a record-breaking year in 2021 in many areas of tourism. Arrivals to the state, monitored with GPS technology, show that visitation to the state was up 15.2% with increases from 49 states. Tourism Economics reported that visitation to the state rebounded despite the continued pandemic and obstacles for Canadian travelers. Visitors to the state spent \$2.61 billion last year, generating \$237.9 million in tax revenue for the state and local jurisdictions, according to the data compiled using federal sources like the Bureau of Economic Analysis and the Bureau of Labor Statistics. Visitor spending was substantial despite the fact that North Dakota lost an estimated \$132 million in spending from Canadian travelers. The border closure and associated protocols meant 1.22 million fewer personal vehicle and bus passengers from Canadian. Recent marketing forecasts, however, show optimism with Canadian visitors excited to return.

During the 2021 legislative session, \$6.5 million of CARES Act funds were allocated to expand the state's marketing, inspire visits, and raise awareness of North Dakota. Those dollars allowed the expansion of marketing campaigns, new partnerships with media, testing of new markets, shoulder-season advertising, and an improved digital presence for North Dakota. As a result, traffic to NDtourism.com increased 25.6%, with a record 2.15-million visits (this, on top of a 56% increase in 2020). Website visits are a top signal of intent-to-travel, and it was encouraging to see 281,712 referrals to partner sites.

Visitation metrics provide further evidence of advertising impact and economic rebound. Airport arrivals, national park visits, and hotel occupancies were all up significantly. Sales tax receipts specific to the sectors of arts, entertainment and recreation, and



Sara Otte Coleman unveils the newly branded visitor services area at the Chateau De Mores Visitor Center near Medora. The site provides brochures from partners who participate in the literature distribution program and state historical society staff provide personal service to visitors. A similar updated display at the Oriska Rest Area was also installed.

accommodations and food services were not only up, but were the highest in five years. While we understand that not all taxes in these categories are paid by visitors, the revenue generated for the state and communities is critical. To put it in perspective, accommodations and food services earned the state more revenue in Q3 than any other sector, with the exception of retail trade (which is also part of the tourism industry) and wholesale trade.

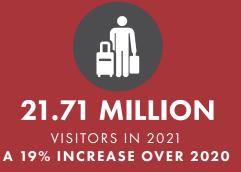
The results of 2021's promotional investments are continuing to be seen in these first few months of 2022 and we look forward to building on this great momentum. As always, please reach out if you have any questions.

North Dakota Tourism & Marketing Director

Sara Otto Oleman
Sara Otto Coleman

#### Research

North Dakota's travel industry has made significant rebounds in visitation and visitor spending. In 2021, we were at 92% of the record visitor volume seen in 2019.





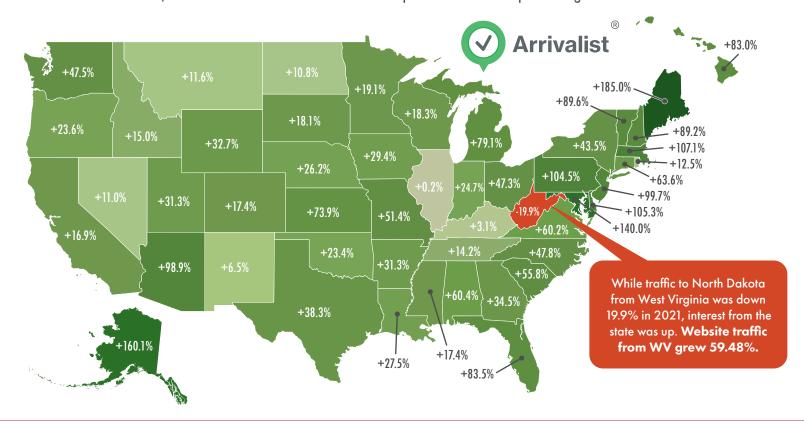


\$237.9 MILLION

ESTIMATED STATE & LOCAL TAX REVENUE - AN 8.6% INCREASE

### TRIPS TO NORTH DAKOTA INCREASED FROM 49 STATES

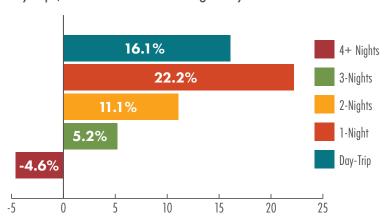
North Dakota partners with Arrivalist, a geo-location intelligence company, for data on U.S. adult road trips to the state. Arrivalist sources information from mobile devices and GPS providers in order to report travel-specific data including a consumer's entire journey to, within and back from a destination. Their anonymized GPS location data, for more than 120-million users, is accurate to 30 feet and reveals the sequence of visitors' trips for insights on in-market behavior.



In 2021, Arrivalist monitored 16,725,823 U.S. adult road trips to North Dakota, a 15.2% increase from 2020.

# **YOY Change by Length of Stay**

The pandemic continued to impact trip spontaneity and length of stay. North Dakota saw the largest growth in one-night stays and day trips; with decreased multi-night stays.



# Top Non-Resident Origin Markets

Rank	Location
1	Minneapolis/Saint Paul
2	Sioux Falls/Mitchell
3	Chicago
4	Billings
5	Rapid City
6	Duluth/Superior
7	Denver
8	Seattle/Tacoma
9	Glendive
10	Great Falls

#### ADVERTISING & MARKETING

North Dakota Tourism invested an unprecedented \$9 million promoting North Dakota, its communities, and tourism-related businesses in 2021. Marketing and advertising stretched beyond motivating vacations, to lift state image, inspire relocation, showcase quality of life, and drive business while delivering memorable experiences.



First-ever winter campaign aired in-state and regionally, showcasing skiing, skating, snowmobiling, hiking, dining, fishing, and winter fun available in North Dakota. Creative included a new TV commercial, digital, social, and print ads.

#### Q1 RESULTS:

- Website traffic surged 68% higher than 2019.
- Taxable sales and purchases in the hospitality sector were up 10.8% higher than the previous quarter.









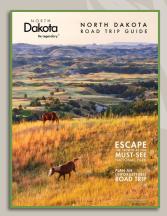
















#### Q2 RESULTS:

- More than 52,000 visits to the online road trip content and itineraries.
- Fully distributed all 175,000 Road Trip Guides.
- Hotel occupancy was 20% higher than the same quarter 2020.
- State revenue in hospitality taxable sales almost fully recovered, just 0.59% lower than 2019.

The boom in road trips and outdoor adventure perfectly aligned with North Dakota's tourism product and promotions. A new Road Trip Guide was released in lieu of a Travel Guide. New road trip website content was developed, along with native digital content, and a "North Dakota Road Trip Playlist" available on Spotify, Apple Music, YouTube Music, Amazon and Pandora.

# INTEND TO TRAVEL METRICS

# **WEBSITE TRAFFIC**

**USERS** 2,014,837 27.56% increase

**SESSIONS** 2,155,110 25.56% increase

**PAGEVIEWS 2,562,789** 15.97% increase TRADITIONAL INQUIRIES

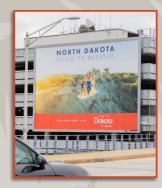
27,668

Q3

Programmed \$6-million CARES funding to expand marketing, advertise into the shoulder and winter seasons, inspire visits and raise awareness of North Dakota. New niche campaigns reached motorcyclists, golfers and cyclists.

#### Q3 RESULTS:

- State Q3 revenue in the hospitality sector bested 2019 by 2.41%, totaling \$562,948,389.
- Record Q3 visitation at TRNP with 463,770 recreation visits.
- Niche emails had an open rate of 17.93%; double the industry average.



















#### **Q4 RESULTS:**

- Website traffic from Canada increased 362.6%!
- Border crossings into North Dakota increased 248.8% over 2020; but were still down 68.5% from 2019.
- Hotel occupancy was 10.1% higher from Q4 2020 and was nearly at 2018 levels.
- Advertising impressions for the year totaled a record 842,168,233.

Q4

The U.S. border reopened to recreational travel from Canada and an advertising campaign in Manitoba and Saskatchewan went full-strength with TV, radio, print, out-of-home, digital and social.



TV/RADIO **202,197,875** 

Doubled the reach of previous years; vanity URL use increased 2,043%



PRINT 12,260,330

In 44 magazines and newspapers; print referrals to website increased 137%

# REACH



OUT-OF-HOME **254,995,712** 

Bonus advertising continues into 2022



DIGITAL **313,577,484** 

Tripled digital presence;
Traffic to the website
increased 390% over 2020



SOCIAL MEDIA 17,480,213

Conversion to the website increased 36.29%

#### **PUBLIC & MEDIA RELATIONS**

North Dakota's public and media relations efforts continued to tell the North Dakota story, garner positive media coverage and increase awareness and consumer engagement. In 2021, interest from regional and national media ramped up as travelers wanted to learn more about North Dakota's wide-open spaces, friendly places, and authentic cultural experiences.

#### **2022 Midwest Living Road Rally**



North Dakota Tourism hosted the 2022 Midwest Living Road Rally this past July. The Midwest Living editorial team created a robust itinerary visiting six communities showcasing 31 legendary experiences.

Watch for the North Dakota feature to run in June of 2022 and follow #MWLRoadRally2022 on social media.



MEDIA PLACEMENTS



# 1.34 BILLION

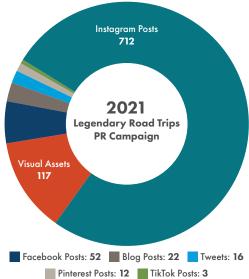
ESTIMATED AUDIENCE REACH THROUGH EARNED MEDIA



# 2021 STATE-FUNDED INFLUENCER CAMPAIGN

- Hosted **15** influencers
- Audience over **1.18M**
- Impressions over 1.46M
- Social media engagements over 161K

#### 2021 Legendary Road Trips PR Campaign





Tourism ran a strong Legendary Road Trips campaign Sept.-Oct., that showcased local travel and community experts on radio stations in the Minneapolis and Chicago markets. This activation included eight interviews with nearly 90 minutes of interview content leveraged for the campaign driving 7.2 million impressions via on-air and social media.

#### SOCIAL MEDIA

Marketing North Dakota on social media gave us world-wide platforms to showcase our state in both organic efforts and paid campaigns. Our efforts included audience engagements, travel counseling, inspiring traffic to the website and visitors to the state.







2,222,917

CONTENT SHARED
52% decrease



#### WE'RE LEGENDARY BECAUSE WE'RE AUTHENTIC.

The best way to inspire adventure is to share real and unfiltered experiences in North Dakota. These images, stories and testimonies shared on social from visitors and residents were used across various marketing channels and motivated others to do the same.

#### On the Web











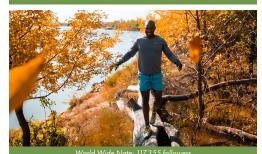




These stories were shared on the website through actionable CrowdRiff galleries that connected visitors to business listings and partner websites.

- 121 total galleries containing hundreds of assets.
- Galleries garnered
   187,000 views with
   72,000 engagements.

#### **Influencer Impact**







#### **Love From the Fans**

"I have traveled the world and the badlands and Medora are still one of my favorite places."

"Traveling through North Dakota was an eye opener to it's beauty and wonderful places and things to see and do. The people are awesome, too!!"

"During our two annual migrations North Dakota is FULL of life with scenes of birds that would rival any Nat Geo production. There is no where like it!"

"Haven't visited ND since 2016, but I see these photos and I know a trip back is gonna happen eventually."

"One of the most gorgeous serene places I have been blessed to see ... my dog loved it too."

#### North Dakota Tourism Social Media Channels



@TravelND



@NorthDakotaLegendary



Travel North Dakota



@NorthDakota



Travel North Dakota



@travelnorthdakota

#### NORTH DAKOTA TRAVEL INDUSTRY

Travel Segment	2020	2021	+/-
State Park Visitors	1,364,169	1,344,741	-1%
National Park Visitors	569,313	826,099	45%
Major Attractions	1,645,936	3,999,505	143%
Local Visitor Centers	29,132	52,375	80%
Cumulative Lodging Tax	\$2,475,791	\$5,552,640	124%
ND Airport Deplanements	577,467	887,804	54%
Canadian Border Crossing	129,207	96,219	-26%
Statewide Hotel Occupancy Rate	38.7%	47.7%	22.9%

# TAXABLE SALES & PURCHASES THROUGH 3RD QTR 2021

#### Accommodations/Food Services

2020	2021	+/-	
\$1,121,531,668	\$1,382,650,572	23.28%	
Arts/Entertainment/Recreation			
2020	2021	+/-	
\$75,722,761	\$98,550,322	30.15%	

# LOSSES IN HOSPITALITY SECTOR BUSINESSES AND EMPLOYMENT SEEN IN 2021

While interest surged and U.S. visitation rebounded, visitor spending has declined due to a loss of businesses and service. According to the 2020 report of North Dakota Job Service's Labor Market Information, there was a loss of 29 businesses from 2019 to 2020 and a decrease of 6,195 jobs in the hospitality sector.

#### **Total Business Establishments**

	2019	2020
Arts, Entertainment & Recreation	510	502
Accommodation & Food Service	2,299	2,278
Average Annual Employment		

Arts, Entertainment & Recreation	5,617	4,762
Accommodation & Food Service	34,806	29,466

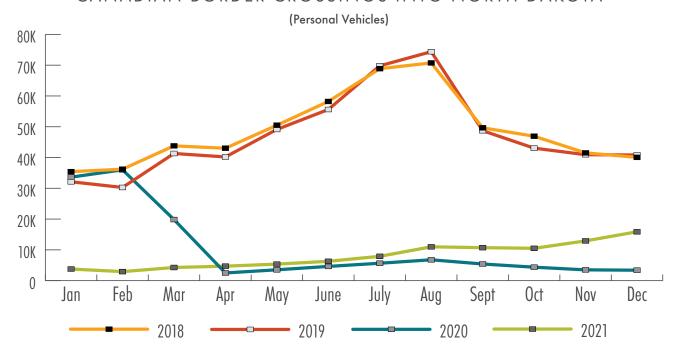
2019

2020

#### **Depressed Canadian Visitation Has Significant Impacts**

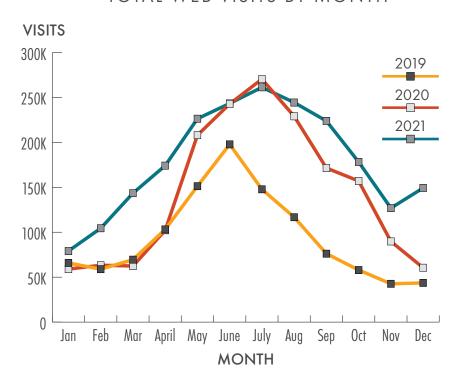
The U.S. border reopened to recreational travel from Canada in November 2021, but vaccination and testing requirements continued to impede visitation. In 2021, there were 155,912 personal vehicle and bus passengers entering North Dakota; a 90% decrease from visitation in 2019. Through 2021, lost Canadian visitor spending due to the pandemic is estimated at \$275,209,736.

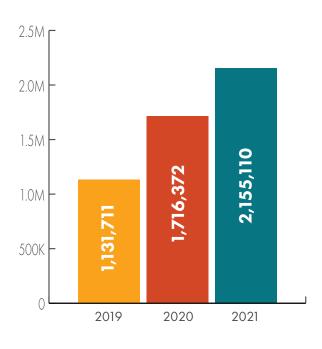
#### CANADIAN BORDER CROSSINGS INTO NORTH DAKOTA



#### TOTAL WEB VISITS BY MONTH

#### TOTAL WEB VISITS BY YEAR

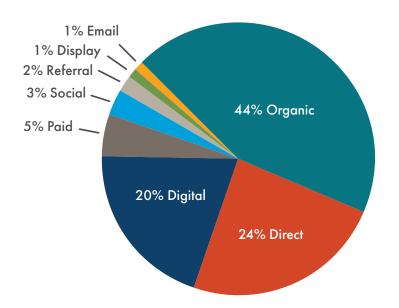




TOP LOCATIONS FOR WEBSITE TRAFFIC

Rank	Location
1	North Dakota
2	Minnesota
3	Illinois
4	Wisconsin
5	Colorado
6	California
7	Texas
8	Florida
9	New York
10	South Dakota

ORIGIN OF SITE TRAFFIC FOR NDtourism.com



#### GLOBAL MARKETING

The Global Marketing program educates overseas markets about North Dakota's travel and tourism offerings and motivates travel and visitor spending. Efforts in 2021 continued to focus on virtual sales missions, digital pitching and innovative ways to showcase the state, with in-person sales missions at Brand USA Travel Week show in London and IPW in Las Vegas.





- 82 leads were collected from virtual shows including Brand USA Travel Week, Brand USA Media Forum, GAW Virtual Sales Mission, and One to One Business meetings with Asia Pacific/ Australia and New Zealand.
- Brand USA Travel Week in September allowed North Dakota and partner, Fargo-Moorhead-West Fargo CVB, to meet with 36 International tour companies and make numerous contacts during the networking sessions.
- North Dakota Tourism had an Express Booth at IPW in Las Vegas, due to the limited number of international attendees. Forty-one leads resulted from the show.



83.8 MILLION
READERS THROUGH
102 STORIES



# TRIBAL TOURISM

North Dakota Tourism continues as an active member of the North Dakota Native Tourism Alliance. While the pandemic has delayed some work, the advisory board continues to work with George Washington University to organize sustainable programming, develop product and educate tourism staff. The group's plan to host a major cultural event starting with Turtle Mountain Band of Chippewa followed up by Standing Rock and Spirit Lake will continue once it is deemed safe.

# 2021 Highlights

- Mandan Hidatsa Arikara Interpretive Center (right) opened on the shores of Lake Sakakawea near New Town.
- State Fair programing expanded to include MHA dancing, drumming and interpretation.
- Darian Morsette, Director of MHA Nation Tourism was elected to the board of directors for the American Indian and Alaska Nations Tourism Association.
- Global Exposure Native American experiences are featured in every international presentation.
   International Travelers want to experience the Native American culture, not only at powwows but on tribal lands with daily offerings.
- Group Marketing works with tour operators to add Native American cultural experiences and destinations into their itineraries.



#### **GROUP TRAVEL**

The Group Travel Industry and North American tour companies are continuing to modify tour policies to coincide with protocols in place set by the CDC for safer travel and tours.







#### 150+ SCHEDULED APPOINTMENTS

- Ten new tours booked for 2022/2023.
- Peak interest in outdoors, culture and agritourism activities and experiences.
- Three previously canceled tours have rescheduled for 2022.



TOURS WORKED BY

90 OVERNIGHTS

AND AN ESTIMATED

IMPACT OF

\$410,000



DEVELOPMENT TOURS

WITH VISITS TO 26 COMMUNITIES

FEATURING ND PRODUCTS

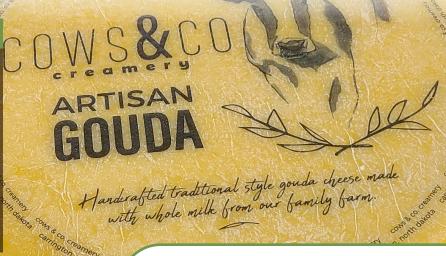


#### **AGRITOURISM**

North Dakota's farm and ranch legacy is well known, and visitors are seeking more farm and ranch experiences. AgriTourism development is an initiative of North Dakota Tourism, allowing farmers and ranchers the ability to diversify their operation and generate additional income through activities, programs, rentals and on-site sales.

# 2021 Highlights

- More than 60 agritourism partners are offering product for increased revenue.
- 47 vineyards, wineries, a meadery and cidery continue to grow in visitation.
- Demand for ag-based experiences is worldwide. North Dakota Tourism markets to: Germany, United Kingdom, Italy, France, Nordic Countries, Benelux Countries, Australia, and New Zealand Source: Allied Market Research.





#### **OUTDOOR MARKETING**

North Dakota Outdoor's promotions program works to entice outdoor enthusiasts to find adventure in North Dakota. Efforts included paid sponsorships, media relations, social media, and consumer travel shows.



Tourism showcased North Dakota's outdoor experiences at the Sioux Empire Sportsmen's Show in Sioux Falls, SD. Attendees stopping by the booth was up a 22% over 2019.



Advertorial content in Ducks Unlimited Magazine was adjusted to feature images and content promoting spring snow goose hunting. North Dakota Game & Fish sold nearly 800 additional snow goose licenses – up 124% over 2020.



Mike Jensen was a guest on the nationally distributed *The Flush* podcast. In a year where most license sales were down, nonresident small game license sales saw a 3% increase. Tourism staff received dozens of inquiries from across the country that named *The Flush* podcast as the reason they were seeking more information.



TOURISM DISTRIBUTED
ALL THE REMAINING
2020 HUNTING AND
FISHING GUIDES BY
EARLY AUGUST. HUNTING
AND FISHING GUIDES
WERE CARRIED IN NORTH
DAKOTA'S REST AREA
BROCHURE RACKS FOR A
SECOND SEASON.

#### RECREATION DEVELOPMENT

2021 saw the highest participation rate for outdoor recreation on record and continuation of pandemic travel trends that included historic rates of camping, hiking, and biking. Development of new recreation experiences will be key to drawing new travelers to the state. The opportunity to attract more may be limited with existing infrastructure. The development of new activities and opportunities will be key to maintaining and growing visitation to the state. The Bureau of Economic Analysis data shows the current value of outdoor recreation in North Dakota is 2.1% of our state GDP, yet much of North Dakota's outdoor recreation is do-it-yourself, meaning there is an opportunity for business development in packaging outdoor experiences for consumers who are willing to pay for it.



#### PARTNER ENGAGEMENT

North Dakota Tourism staff works to identify, build and sustain strong relationships with tourism and industry partners around the state. They are also at-the-ready to assist partners with research, presentations, resources, content, assets, promotional materials and more. North Dakota Tourism relies on partner-listed and provided attractions, events, accommodations, guides, visitor centers and services and works to promote them.



The Tourism & Marketing Team enjoyed a familiarization tour of several attractions and amenities in the Jamestown and Carrington region.

### 2021 Highlights

8

IN 2021, NORTH DAKOTA TOURISM HOSTED 8 ONLINE INDUSTRY CALLS AND PRESENTATIONS.



TOURISM'S INDUSTRY NEWSLETTER, WHICH TRANSITIONED TO THE COMMERCE NEWSLETTER IN 2022, HAD AN ENGAGEMENT RATE OF 58% IN 2021.



SEVEN PROJECTS WERE AWARDED MAIN STREET TOURISM GRANTS, FOR A TOTAL OF \$96,223, EXPANDING OFFERINGS ACROSS THE STATE.

100

MORE THAN 100 TOURISM PROFESSIONALS ATTENDED THE 2021 TOURISM INDUSTRY MARKETING SUMMIT.

1,800+

PARTNER
LISTINGS ON
WEBSITE

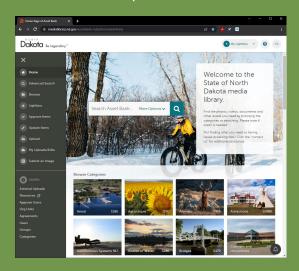
1,700+

PARTNER
LISTINGS IN
TRAVEL GUIDE

REFERRALS TO PARTNER WEBSITES

# **Asset Bank**

Asset Bank allows for easier sharing and a boost to the visuals used across state government. It also increases the visuals available to partners, media and more.



medialibrary.nd.gov

11K+

USERS HAVE ACCESSED SITE 71% INCREASE 7K+

NEW PHOTOS WITH PARTNER CO-OP 79K+

DOWNLOADABLE ASSETS 15K+

**ASSETS** 

UPLOADED

- 1,077 active users (logged in with permissions) according to Asset Bank reporting
- Total image views for 2021 (system-wide): 384,195
- Nine linked partner digital guides housed in Asset Bank with 4,549 views in 2021
- In 2021, from Asset Bank there were 921 Travel Guide views, 21 Road Trip Guide views and 415 Hunting and Fishing Guide views
- Photo cooperative added more than 7,000 photos from 21 communities

#### **VISITOR SERVICES**

Providing personal customer service to visitors and potential visitors is a top priority at North Dakota Tourism. We advise travelers on best routes, itineraries, attractions, events and communities to fit their interests and schedules. Our counselors commonly hear, "I'm so happy to talk to a real person!" which often results in a longer stay. There are more than two-dozen trip itineraries available on NDtourism.com which have been a popular request among potential visitors.

WE MAKE OURSELVES AVAILABLE TO VISITORS AROUND THE WORLD











TODAY'S TRAVEL COUNSELING TAKES PLACE ONLINE AND OFFLINE, THROUGH PHONE, MAIL, EMAIL, SOCIAL MEDIA, CHAT AND ONLINE TRAVEL FORUMS.



58,181

2020 TRAVEL GUIDES
DISTRIBUTED
4,800 THROUGH
REST AREAS



148,382

ROAD TRIP GUIDES
DISTRIBUTED
9,460 THROUGH
REST AREAS



281,712

REFERRALS TO
PARTNER WEBSITES



18,405

HUNTING & FISHING GUIDES DISTRIBUTED 5,640 THROUGH REST AREAS

# **Live Chat Travel Counseling for NDtourism.com**

ONLINE TRAVEL COUNSELORS HAVE RESPONDED TO

1,500+

LIVE CHATS WITH POTENTIAL NORTH DAKOTA VISITORS SINCE MAY 2021 LAUNCH

"Quick, hard-working, and friendly staff. Just like the people of North Dakota, you can feel the real warmth come through, which you won't get anywhere else."

> Real comments from actual chat participants!

"As a professional journalist, I always appreciate when my research is made easier, and I do it often enough to be able to tell the difference! Thanks, team!"



#### **BUSINESS COMMUNITY**

The expanded work of North Dakota Tourism and its tourism and marketing staff focuses on brand building and the integration of visitation, relocation, talent attraction, Main Street, and economic development efforts.

Research shows that North Dakota Tourism's promotional campaigns create a "halo effect" beyond motivating travel. Ripple effects of advertising positively impact the state's image as a place to live, work, start a business, attend college, purchase a home, and retire.

# Halo Effect of North Dakota Tourism Marketing



# **Talent Attraction Partnerships**

Two exciting developments of 2021 were new partnerships with RoleCall and Development Counsellors International (DCI).



RoleCall is a national talent attraction agency working with the state on a two-year endeavor to address workforce needs.



DCI is a specialized marketing firm focusing efforts on garnering more national media coverage of North Dakota, the business climate, economic and workforce development.

# **Stakeholder Survey Report**



The Tourism Division conducted a survey in 2021 to determine strategic priorities for on-going work. 67.8% of respondents indicated that the current five strategic priorities should remain the same. The survey also evaluated partner programs and their priority and effectiveness. For a copy of the survey email marketing@nd.gov.

# **Grants Distributed**

Tourism marketing staff were instrumental in the marketing, planning, execution and follow-through of special grants distributed to businesses within North Dakota.

TRAVEL AGENT AND TOUR OPERATORS GRANT (TATO)

APPROVED

\$1.4M

EVENTS AND SUPPORT SERVICES GRANT (ESSG)

28
APPROVED
APPLICATIONS

\$2M

TOURISM PLANNING GRANT

5 APPROVED APPLICATIONS

\$1M AWARDED

# A LEGENDARY INDUSTRY AT A GLANCE



**21.71 MILLION** 

VISITORS IN 2021 **A 19% INCREASE OVER 2020** 



**\$2.61 BILLION** 

IN VISITOR SPENDING
A 23.5% INCREASE OVER 2020



\$237.9 MILLION

ESTIMATED STATE & LOCAL TAX REVENUE - AN 8.6% INCREASE



35,561

JOBS SUPPORTED BY THE TRAVEL INDUSTRY



4,350,756

HOTEL ROOM NIGHTS SOLD
22.9% OCCUPANCY INCREASE



887,804
AIRPORT ARRIVALS
54% INCREASE



2,170,840
STATE AND NATIONAL PARK
VISITORS - A 12.27% INCREASE



96,219
CANADIAN BORDER CROSSINGS
A 26% DECREASE

VISITOR SPENDING BRINGS OUTSIDE DOLLARS INTO NORTH DAKOTA'S ECONOMY.













Tourism
COMMERCE

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@TravelND



@NorthDakotaLegendary



Travel North Dakota



@NorthDakota



Travel North Dakota



@travelnorthdakota